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Approved For Release 2000/05/08 : CIA-RDP78-03091A000200030003-2

RAD INTERNAL PROCEDURE  
No. 2

16 September 1968

Policy and Procedures Governing Correspondence with Retirees

1. General Policy

The Retirement Affairs Division (RAD) will routinely initiate follow-up correspondence with each retiree on the sixth-month anniversary of his retirement. In general terms, this correspondence will convey to the retiree the Agency's continuing interest in his well-being, adjustment to retirement, employment situation, and to solicit other information of potential value to the retirement program. Exceptions to this policy will be made in those situations where the Central Cover Staff, Office of Security, the Special Activities Staff/OP, Benefits and Services Division/OP or the parent division of the retiree interpose conditions on the contacting of an individual. Normally, if a retiree fails to respond to the six-month letter, another letter will not be sent.

2. Procedures

a. Preparation and Review of Correspondence Lists

Each month the Retirement Operations Branch (ROB) will furnish to the External Employment Assistance Branch (EEAB) a list of the names of those employees who retired five months previously. A copy of this list will be forwarded by EEAB to the Central Cover Staff, Office of Security, BSD/OP and to SAS/OP for review and concurrence prior to the preparation of the follow-up letter. Concurrence of the Agency component (i.e., division/staff) to which the retiree formerly was assigned will be obtained by telephone.

b. Preparation of Follow-up Letters

The EEAB will prepare the standard follow-up letter for each of the retirees on the approved list. Although a standard format and wording will be used, in each case the letter will be typed as an original. (See Tab A.) Attached will be a standard form for completion by the retiree. (See Tab B.) Letters will be completely

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GROUP 1  
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c. Retiree Responses

- (1) Responses to the follow-up letters will be received, recorded and tabulated by EEAB, and will then be forwarded to C/RAD for review and a determination as to the need for further action.
- (2) If the C/RAD determines that further action is required, he will:
  - (a) Return to EEAB those responses requiring action related to employment assistance.
  - (b) Designate an RAD officer to undertake any other action required.

d. Official Replies

- (1) EEAB will prepare replies to those responses requiring action related to employment assistance.
- (2) The designated RAD action officer will assemble whatever information is required and prepare an official reply in final form (less signature) on all other responses requiring action.
- (3) In any instance where the C/RAD or the action officer (EEAB or RAD) detects any element or facet of the case which suggests a potential security problem or concern, a further check will be made with the Office of Security and/or Central Cover Staff, as appropriate, before an official reply is dispatched.
- (4) All replies prepared by RAD will be routed to EEAB for signature and dispatch. An accompanying memorandum should contain sufficient data to permit EEAB to close the case, including identification of the office or individual from whom the substantive information was obtained or to whom referral was made.
- (5) Letters of reply will be completely sterile, on plain bond paper, and signed with the established alias. The return

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Date \_\_\_\_\_

Retiree \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_


Dear \_\_\_\_\_:

As your former employer, the organization is sincerely interested in you and trusts you find the transition period a pleasant experience. I am sure you know the whole retirement program is receiving much emphasis by senior officials here.

In order to be of service to you (if needed) and for statistical purposes, we would like for you to complete the attached form. If there are any questions on the form that you feel you should not answer, please complete the remainder and return it as soon as possible.

Thank you very much for your consideration.

Sincerely,

  
Personnel Officer

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Attachments:  
Questionnaire  
Envelope

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NAME \_\_\_\_\_

CURRENT ADDRESS \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

PHONE \_\_\_\_\_

EMPLOYED YES \_\_\_\_\_ NO \_\_\_\_\_

(If yes) Employer \_\_\_\_\_  
Job Title \_\_\_\_\_  
Salary \_\_\_\_\_  
Full Time \_\_\_\_\_  
Part Time \_\_\_\_\_

INFORMATION DESIRED

SUGGESTIONS

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Guide for Corresponding with Retirees

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Date: \_\_\_\_\_  
(Month, Day, Year)

Retiree's Name  
Street Address  
City & State

Dear \_\_\_\_\_,

This letter is in response to your recent correspondence.

(Personalized response to the retiree's specific requests for information or suggestions are to be included here, in this portion of your letter.)

Should you wish or need to contact us in the future, please direct your correspondence to me at the address indicated above.

Yours very truly,



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